

Semiconductor Chemicals Market by Type (High Performance Polymers, Acid & Base Chemicals, Adhesives, Solvents), Application (Photoresist, Etching, Doping, Cleaning), End Use (Integrated Circuits, Discrete Semiconductor), & Region - Global Forecast to 2030

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Report description:

The semiconductor chemicals market is projected to grow from USD 16.19 billion in 2025 to USD 29.25 billion by 2030, registering a CAGR of 12.6% during the forecast period.

<https://www.marketsandmarkets.com/Images/semiconductor-chemical-market1-Overview.webp>

The global semiconductor chemicals market is experiencing strong growth, supported by the growing complexity of semiconductor devices and a rising demand for high-performance electronic products. Semiconductor chemicals include solvents, acids, bases, photoresists, dopants, and CMP slurries, which are important in many fabrication processes such as photolithography, etching, deposition, and cleaning. In many advanced technologies and semiconductor-related applications, such as 5G, artificial intelligence (AI), Internet of Things (IoT), electric vehicles (EVs), and high-performance computing continue to grow exponentially, and these new technologies will require advanced chips with smaller geometries and sophisticated architectures, creating a demand for ultra-high-purity and application-specific chemical formulations. The growth of consumer electronics, the global shift toward digital transformation, and significant strategic investments in semiconductor manufacturing are the key driving forces in the industry. Major players in this field include Taiwan, South Korea, China, and the US, all of which are making advancements in semiconductor technologies through substantial capital investments and extensive factory expansions. The adoption of extreme ultraviolet (EUV) lithography and 3D packaging is also boosting the demand for new, innovative, and advanced chemical solutions and products. Despite facing challenges such as rising operational costs and constraints in raw

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material supply, the global outlook for the semiconductor chemicals market remains positive.

"Solvents segment to register the fastest growth in the semiconductor chemicals market in terms of value during the forecast period"

Solvents hold the largest market share within the semiconductor chemicals sector, primarily due to their crucial role and extensive application throughout the semiconductor fabrication process. They are prevalent across various subcategories of semiconductor materials. Ultra-high purity solvents, such as isopropyl alcohol (IPA), acetone, and N-methyl-2-pyrrolidone (NMP), are especially vital for the semiconductor industry and its many subsegments, including photolithography, wafer cleaning, and surface preparation. These solvents are essential for removing photoresists and other organic residues, as well as contaminants like particles, while preventing any damage to the intricate chip structures or defects from other chemicals. As semiconductor devices shrink to sizes of 5nm or smaller, achieving and maintaining ultra-clean surfaces has become increasingly challenging. High surface cleanliness is crucial, which drives up the volume of solvent usage. The quantity of solvents employed is significant compared to other types of materials used in semiconductor fabrication because these solvents are typically recycled throughout the fabrication process for both the front-end and back-end stages. They play a vital role in quality control, ensuring the overall product meets standards, and in enhancing the operational efficiency of the manufacturing process. Moreover, the wide range of equipment and materials compatible with solvents contributes to their widespread adoption. As the semiconductor industry continues to expand in response to the growing demand for electronics, 5G technology, artificial intelligence (AI), and electric vehicles (EVs), the consumption of solvents is expected to rise. Therefore, solvents remain the most significant and reliable category within semiconductor chemicals.

"Photoresist segment to register the fastest growth in the semiconductor chemicals market during the forecast period"

Photoresist is the fastest-growing segment in the semiconductor chemicals market because it plays a crucial role in photolithography, the essential process of transferring intricate circuit patterns onto semiconductor wafers. As the semiconductor industry expands into smaller technology nodes (i.e., 5nm, 3nm, and below) with more complex chip architectures, the demand and requirements for next-generation photoresists have increased; specifically, the demand for improved resolution, sensitivity, and etch resistance. Recent advancements in technology, such as extreme ultraviolet (EUV) lithography, have significantly increased the demand for next-generation photoresist materials. These materials are essential for achieving the precision required in sub-nanometer fabrication. Each wafer undergoes several cycles of photolithography, which consume substantial quantities of photoresist used frequently throughout the manufacturing process. As chipmakers adopt multi-patterning and 3D integration technologies, the amount of photoresist used per wafer is rising at a similar pace. Furthermore, the growing demand for high-performance chips used in AI, 5G, automotive electronics, and data centers is intensifying the requirements for photolithographic materials that are cost-effective, scalable, and reliable. Investments in new semiconductor fabrication facilities, coupled with increased research and development efforts-especially in the Asia Pacific region and the US-are well-positioned to drive the rapid growth of the photoresist market.

"Asia Pacific is projected to be the fastest-growing region in the semiconductor chemicals market in terms of value during the forecast period"

The Asia Pacific region holds the largest share of the semiconductor chemicals market, largely due to its dominance in global semiconductor manufacturing and the presence of a well-established ecosystem of suppliers, manufacturers, and end users. Countries such as Taiwan, South Korea, China, and Japan are home to some of the world's largest semiconductor foundries and integrated device manufacturers, including TSMC, Samsung Electronics, SK Hynix, and Toshiba. This results in a high demand for high-purity chemicals used in wafer processing, including lithography, etching, doping, and wafer cleaning. The semiconductor supply chains in this region benefit from a well-developed infrastructure, a skilled labor force, cost-effective fabrication facilities, and strong government support for the electronics and semiconductor industries. Additionally, the increasing demand for semiconductors driven by technologies such as 5G, IoT, AI, and electric vehicles is pressuring end users to consume more

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associated chemicals. China's push for self-sufficiency in its semiconductor supply chains, supported by policy direction and significant investments in local fabrication and material supply chains, has further fueled market growth. Meanwhile, Japan and South Korea continue to excel in the materials and chemicals industry, offering advanced innovations and specialized semiconductor-grade chemicals.

In-depth interviews were conducted with chief executive officers (CEOs), marketing directors, other innovation and technology directors, and executives from various key organizations operating in the semiconductor chemicals market, and information was gathered from secondary research to determine and verify the market size of several segments.

-□By Company Type: Tier 1 - 50%, Tier 2 - 30%, and Tier 3 - 20%

-□By Designation: Managers- 15%, Directors - 20%, and Others - 65%

-□By Region: North America - 20%, Europe - 30%, Asia Pacific - 40%, Middle East & Africa - 5%, and South America - 5%

The semiconductor chemicals market comprises major players such as Tokyo Ohka Kogyo Co., Ltd. (Japan), JSR Corporation (Japan), BASF (Germany), Solvay (Belgium), Dow (US), Honeywell International Inc. (US), FUJIFILM Holdings Corporation (Japan), Eastman Chemical Company (US), Merck KGaA (Germany), Sumitomo Chemical Co., Ltd. (Japan), SK Inc. (South Korea), and DuPont (US). The study includes an in-depth competitive analysis of these key players in the semiconductor chemicals market, with their company profiles, recent developments, and key market strategies.

Research Coverage

This report segments the semiconductor chemicals market by type, application, end-user, and region and estimates its overall value across various regions. It has also conducted a detailed analysis of key industry players to provide insights into their business overviews, products and services, key strategies, and expansions associated with the Semiconductor chemicals market.

Key benefits of buying this report

This research report is focused on various levels of analysis - industry analysis (industry trends), market ranking analysis of top players, and company profiles, which together provide an overall view of the competitive landscape; emerging and high-growth segments of the semiconductor chemicals market; high-growth regions; and market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

-□Analysis of drivers: (increasing demand for advanced electronics, focus on sustainability and green manufacturing, and rising adoption of IoT and 5G), restraints (energy intensity and rising operational costs), opportunities (development of specialty chemicals for quantum computing), and challenges (complexity of scaling production for emerging materials).

-□Market Penetration: Comprehensive information on the semiconductor chemicals offered by top players in the semiconductor chemicals market.

-□Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, product launches, expansions, investments, collaborations, partnerships, and announcements in the market.

-□Market Development: The report provides comprehensive information about lucrative emerging markets and analyzes the semiconductor chemicals market across regions.

-□Market Capacity: Wherever possible, the production capacities of companies producing semiconductor chemicals are provided, along with upcoming capacities for the semiconductor chemicals market.

-□Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the semiconductor chemicals market.

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